

011 - CLERK OF THE BOARD

Operational Summary

Mission:

The Mission of the Clerk of the Board of Supervisors is to provide the County and its citizens easy access to information and guidance to facilitate fair, equitable and open participation in the decision and policy making of Orange County government.

Strategic Goals:

- Facilitate the decision and policy making of Orange County government.
- Ensure the assessment appeals process is fair, timely and equitable; and promote public understanding of the process.
- Ensure records are maintained, legislative history of the County is preserved and documents are readily available to our clients.

Key Outcome Indicators:

Performance Measure	2003 Business Plan Results	2004 Business Plan Target	How are we doing?
PERCENT OF ACCURATE BOARD OF SUPERVISORS AGENDA TITLES. What: Measurement of COB's accuracy and training. Why: Indicator of COB's compliance with Brown Act and identifies areas requiring training.	98.5% of published agenda titles were accurate with no errors.	99.25% of agenda titles are published with no errors.	COB has consistently maintained a high level of accuracy.
PERCENT OF ACCURATELY COMPLETED AND TIMELY FILED ASSESSMENT APPEALS APPLICATIONS. What: Indicator of taxpayers' and agents' understanding of applications and process. Why: Measures success of the COB's training and outreach efforts to the public and tax agents.	88.6% of applications were completed accurately and timely filed.	85% of applications accurately completed and timely filed.	Litigation regarding 2% cap on annual property tax value increase has created public confusion, resulting in more inaccurate applications during the last two filing periods.
PERCENT OF ASSESSMENT APPEAL CLAIMS DECIDED OR WAIVED WITHIN 2 YEAR DEADLINE. What: Indicator of success managing caseload to ensure required actions are taken before legal deadline. Why: Assesses whether policies and procedures result in processing appeals within the statutory deadline.	98.2% of 2002 appeals have been resolved or waivers received. Cases in litigation included in unresolved. COB anticipates similar results for appeals filed in 2003.	100% of appeals resolved or waivers filed, excluding cases in litigation.	COB meeting goal due to manageable number of filings and quality tracking of database information and appeals.

At a Glance:

Total FY 2003-2004 Projected Expend + Encumb:	2,304,148
Total Recommended FY 2004-2005 Budget:	2,516,209
Percent of County General Fund:	0.10%
Total Employees:	33.00

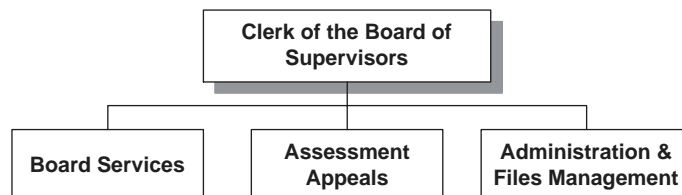
Key Outcome Indicators: (Continued)

Performance Measure	2003 Business Plan Results	2004 Business Plan Target	How are we doing?
PERCENT OF ASSESSMENT APPEALS HEARINGS HELD OR SCHEDULED WITHIN ONE YEAR OF FILING. What: Indicator of efficiency in processing and scheduling appeals. Why: Measures COB's success in timely resolution of appeals & reduces filings in following filing period.	100% of 2003 filings held initial hearings within one year, excluding those with applicant waivers filed.	95% of hearings scheduled within one year, excluding filings with applicant waivers.	With filings remaining at a manageable level for several years and usage of automation, COB has been successful in providing this level of client service. However, with increased filings, ability to provide this level of service may decline.
RESULTS OF CUSTOMER SATISFACTION SURVEYS. What: Measurement of success in meeting clients' needs. Why: Assesses COB's success in meeting the needs of its customers in a professional and courteous manner.	COB has received favorable ratings from 95%-100% of respondents.	97% rating of services as good or outstanding.	COB has received favorable ratings from 95%-100% of its clients.

FY 2003-2004 Key Project Accomplishments:

- Completed implementation of E-Agenda enterprise automation
- Expanded use of E-File Assessment Appeals online application.
- Completed assessment appeals database conversion to new operating system
- Continued community outreach workshops and expanded training program for County agencies/departments

Organizational Summary



COB - EXECUTIVE - Provides leadership and vision, management oversight and direction to all COB functions; performs administrative functions including budget preparation and monitoring, strategic financial projections, human resources, legislative analysis, prepares business plan and monitors progress in meeting goals and performance indicators.

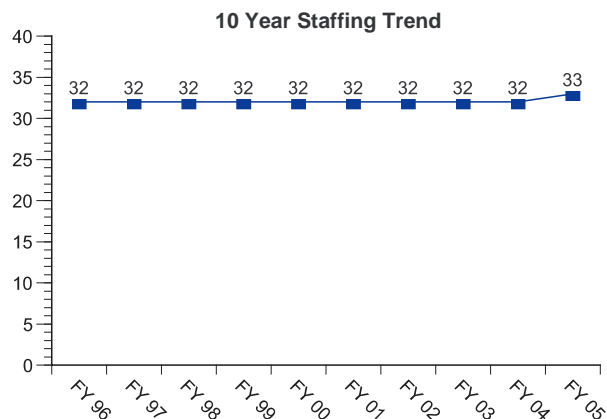
BOARD SERVICES - Prepares and publishes agendas for Board of Supervisors and other authorities in accordance with legal requirements for public meetings; records and publishes actions taken by the Board; maintains official rosters of Boards, Commissions and Committees; processes legal publications, postings and notices; receives and admin-

isters bid openings for County projects; administers oaths of office for various elected and appointed officials and employees; serves as filing officer for Statement of Economic Interest forms; receives and processes claims, summons and complaints against the County.

ASSESSMENT APPEALS - Receives and processes assessment appeal applications; schedules hearings in accordance with legal requirements; prepares minutes and processes actions of the Appeals Boards and Hearing Officers; provides assistance and education on the assessment appeals process to the general public and professional groups through workshops, brochures and the Internet.

ADMINISTRATION/FILES MGT - Provides files management for all records that the Clerk of the Board is required to maintain; assists County staff and the public with research and retrieval of information; provides technical knowledge and coordination in development and implementation of automation projects; provides end-user system support services; performs purchasing, petty cash and payroll functions for COB and the Board of Supervisors Offices.

Ten Year Staffing Trend:



Ten Year Staffing Trend Highlights:

- Increase to staffing in FY 95-96 due to transfer of assessment appeals intake function from the Assessor. COB has been able to maintain level staffing since that time, largely due to automation of previously labor-intensive activities. Increase of 1 position in 04-05 due to transfer from CEO of rotating position to support Board Chairman.

Proposed Budget and History:

Sources and Uses	FY 2002-2003 Actual	FY 2003-2004 Budget As of 3/31/04	FY 2003-2004 Projected ⁽¹⁾ At 6/30/04	FY 2004-2005 Recommended	Change from FY 2003-2004 Projected	
					Amount	Percent
Total Positions	-	32	32	33	1	3.13
Total Revenues	7,635	8,800	7,083	99,300	92,217	1,301.95
Total Requirements	2,282,643	2,321,697	2,316,943	2,516,209	199,266	8.60
Net County Cost	2,275,008	2,312,897	2,309,860	2,416,909	107,049	4.63

(1) Requirements include prior year encumbrances and expenditures. Therefore, the above totals may not match FY 2003-2004 projected requirements included in "At a Glance" (Which exclude these).

Detailed budget by expense category and by activity is presented for agency: Clerk of the Board in the Appendix on page 441.

Highlights of Key Trends:

- COB will continue to pursue new automation and enhancements to existing systems when it is cost effective and provides greater access to information and ser-

Budget Summary

Plan for Support of the County's Strategic Priorities:

Through use of automation developed and implemented over the past few years, COB has been able to reduce ongoing operational costs and maintain level staffing. COB will continue to pursue cost savings and revenue enhancements where efficient and cost-effective. Ideas implemented include reducing printing costs by distributing materials electronically, sale of County-developed software and scheduling changes to reduce the number of assessment appeal board hearings required.

Changes Included in the Recommended Base Budget:

Transfer of position from CEO budget that supports Board Chairman's office

Funding added from AB589 - State Property Tax Administration Grant, to fill 2 existing Assessment Appeal positions to handle increased filings and to support the additional workload expected as a result of new/enhanced activities by the Assessor in the AB589 contract.

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- COB will continue to review its workflow to increase efficiencies and eliminate any duplicative or unnecessary work products. Assessment Appeal filings have remained at a manageable level for several years, but in 03-04 there was a 38% increase over the prior year's

annual filing period. With continued automation efforts and AB 589 funding of two positions, we are positioned to handle this increase in workload. However, workload could be further impacted by economic, legislative and legal factors.

Budget Units Under Agency Control

No.	Agency Name	Cob - Executive	Board Services	Assessment Appeals	Administration/Files Mgt	Total
011	Clerk Of The Board	357,748	544,593	931,813	682,055	2,516,209
	Total	357,748	544,593	931,813	682,055	2,516,209

011 - CLERK OF THE BOARD

Summary of Proposed Budget by Revenue and Expense Category:

Revenues/Appropriations	FY 2002-2003 Actual	FY 2003-2004 Budget As of 3/31/04	FY 2003-2004 Projected ⁽¹⁾ At 6/30/04	FY 2004-2005 Recommended	Change from FY 2003-2004 Projected	
					Amount	Percent
Charges For Services	\$ 5,130	\$ 5,700	\$ 6,492	\$ 96,200	\$ 89,708	1,381.82%
Miscellaneous Revenues	2,505	3,100	591	3,100	2,509	424.53
Total Revenues	7,635	8,800	7,083	99,300	92,217	1,301.95
Salaries & Benefits	1,625,357	1,742,636	1,737,617	1,965,123	227,506	13.09
Services & Supplies	666,547	578,145	579,087	552,424	(26,663)	-4.60
Services & Supplies Reimbursements	(7,463)	(6,000)	(6,552)	0	6,552	-100.00
Fixed Assets	0	8,216	8,215	0	(8,215)	-100.00
Intrafund Transfers	(1,799)	(1,300)	(1,424)	(1,338)	86	-6.04
Total Requirements	2,282,643	2,321,697	2,316,943	2,516,209	199,266	8.60
Net County Cost	\$ 2,275,008	\$ 2,312,897	\$ 2,309,860	\$ 2,416,909	\$ 107,049	4.63%

(1) Requirements include prior year encumbrances and expenditures. Therefore, the above totals may not match FY 2003-2004 projected requirements included in "At a Glance" (Which exclude these).

Proposed Budget Summary of Clerk of the Board - Executive:

Revenues/Appropriations	FY 2002-2003 Actual	FY 2003-2004 Budget As of 3/31/04	FY 2003-2004 Projected ⁽¹⁾ At 6/30/04	FY 2004-2005 Recommended	Change from FY 2003-2004 Projected	
					Amount	Percent
Charges For Services	\$ 5,130	\$ 0	\$ 6,492	\$ 0	\$ (6,492)	-100.00%
Miscellaneous Revenues	2,505	0	0	0	0	0.00
Total Revenues	7,635	0	6,492	0	(6,492)	-100.00
Salaries & Benefits	332,746	296,436	1,737,617	304,518	(1,433,099)	-82.47
Services & Supplies	123,536	29,630	558,789	53,230	(505,559)	-90.47
Fixed Assets	0	0	8,215	0	(8,215)	-100.00
Total Requirements	456,282	326,066	2,304,621	357,748	(1,946,873)	-84.48
Net County Cost	\$ 448,647	\$ 326,066	\$ 2,298,129	\$ 357,748	\$ (1,940,381)	-84.43%

Proposed Budget Summary of Board Services:

Revenues/Appropriations	FY 2002-2003 Actual	FY 2003-2004 Budget As of 3/31/04	FY 2003-2004 Projected ⁽¹⁾ At 6/30/04	FY 2004-2005 Recommended	Change from FY 2003-2004 Projected	
					Amount	Percent
Miscellaneous Revenues	\$ 0	\$ 0	\$ 591	\$ 0	\$ (591)	-100.00%
Total Revenues	0	0	591	0	(591)	-100.00
Salaries & Benefits	324,653	333,886	0	398,154	398,154	0.00
Services & Supplies	210,928	181,026	8,919	147,777	138,858	1,556.96
Services & Supplies Reimbursements	(7,463)	(6,000)	(6,552)	0	6,552	-100.00

Proposed Budget Summary of Board Services:

Revenues/Appropriations	FY 2002-2003 Actual	FY 2003-2004 Budget As of 3/31/04	FY 2003-2004 Projected ⁽¹⁾ At 6/30/04	FY 2004-2005 Recommended	Change from FY 2003-2004 Projected	
					Amount	Percent
Fixed Assets	0	8,216	0	0	0	0.00
Intrafund Transfers	(1,799)	(1,300)	(1,424)	(1,338)	86	-6.04
Total Requirements	526,319	515,828	943	544,593	543,650	57,678.68
Net County Cost	\$ 526,319	\$ 515,828	\$ 352	\$ 544,593	\$ 544,241	154,811.97%

Proposed Budget Summary of Assessment Appeals:

Revenues/Appropriations	FY 2002-2003 Actual	FY 2003-2004 Budget As of 3/31/04	FY 2003-2004 Projected ⁽¹⁾ At 6/30/04	FY 2004-2005 Recommended	Change from FY 2003-2004 Projected	
					Amount	Percent
Charges For Services	\$ 0	\$ 0	\$ 0	\$ 83,000	\$ 83,000	0.00%
Total Revenues	0	0	0	83,000	83,000	0.00
Salaries & Benefits	607,509	572,303	0	694,715	694,715	0.00
Services & Supplies	312,855	272,763	9,704	237,098	227,394	2,343.41
Total Requirements	920,364	845,066	9,704	931,813	922,109	9,502.78
Net County Cost	\$ 920,364	\$ 845,066	\$ 9,704	\$ 848,813	\$ 839,109	8,647.42%

Proposed Budget Summary of Administration/Files Management:

Revenues/Appropriations	FY 2002-2003 Actual	FY 2003-2004 Budget As of 3/31/04	FY 2003-2004 Projected ⁽¹⁾ At 6/30/04	FY 2004-2005 Recommended	Change from FY 2003-2004 Projected	
					Amount	Percent
Charges For Services	\$ 0	\$ 5,700	\$ 0	\$ 13,200	\$ 13,200	0.00%
Miscellaneous Revenues	0	3,100	0	3,100	3,100	0.00
Total Revenues	0	8,800	0	16,300	16,300	0.00
Salaries & Benefits	360,450	540,011	0	567,736	567,736	0.00
Services & Supplies	19,229	94,726	1,676	114,319	112,643	6,720.17
Total Requirements	379,679	634,737	1,676	682,055	680,379	40,590.79
Net County Cost	\$ 379,679	\$ 625,937	\$ 1,676	\$ 665,755	\$ 664,079	39,618.35%